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BUSINESS GUIDE

For CROs, SuiteProjects Pro Drives the Cost, Risk, and Manual Effort Out of Project Management

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By combining NetSuite SuiteProjects Pro with Top Step's industry-built data migration solution, contract research organizations can save time, improve resource utilization, and earn higher profits on every project.

Big pharma may get the credit when an innovative new drug is brought to market, but behind the scenes there were likely many different organizations working together to get the product over the finish line. Contract research organizations (CROs), for example, support the pharmaceutical, biotechnology, and medical device industries by providing research services on an outsourced, contract basis.

The number of CROs operating in the United States currently stands at 2,722, and that number is steadily increasing. By offloading projects to these companies, life sciences firms can develop new medicines, drugs, and products without having to handle all of the development, commercialization, clinical trials, and/or gathering of real-world evidence on their own.

According to the Tufts Center for the Study of Drug Development, CRO-run clinical trials are completed 30% faster than those managed in-house. That translates to shaving four to five months off the process and \$120 to \$150 million in increased revenue for the CRO's client.

Over the last five years, demand for CRO services has increased as more life sciences firms allocate their R&D budgets to these providers. Universities, foundations, and government organizations also rely on CROs to help defray research and development (R&D) costs, get things done faster and with fewer resources, and simplify the product development process.

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Serving a Growing Client Base

As they take on more clients and expand their operations to meet the growing demand for their services, CROs often realize they need more robust systems. Many still manage their projects in huge Excel workbooks that incorporate different tabs and sheets. Those spreadsheets are often used over an extended period of time as CROs work on multi-year, multimillion-dollar studies.

“CROs create Excel workbooks and then use those workbooks to come up with the upfront pricing for their services and manage their ongoing projects,” said Ronn Breaux, president and CEO at Top Step LLC, a NetSuite Alliance Partner that helps its customers use change management, technology, and training to improve their profitability, efficiency, and scalability. “Then, they’ll

return to the workbooks over and over again to manage the individual projects that they’re working on.”

This manual approach is highly inefficient for an industry that relies heavily on human labor to complete clinical trials and research, manage data results, provide regulation adherence services, and develop and formulate new products. A single project for one client, for example, may require the CRO to interview 15 different patients over a three-year period at a cost of \$5,000 per interview. Then the CRO’s analysts, clinical programmer, and project manager will spend five to seven hours each analyzing and reporting on those interviews.



These activities are all billed by the unit, which means each \$5,000 fee—multiplied by 15 interviews—must be spread over the three-year period and billed as tasks are completed. In most cases, these charges and activities are tracked in Excel spreadsheets.

“All of the typical CRO’s upfront units are planned, and all of the pricing is put together in these unwieldy workbooks,” Breaux said.

The total number of units billed across multi-year programs can run as high as 800—or more.

“These are enormous projects that you’d never want to have to hand-enter into all of these spreadsheets, yet that’s exactly how many CROs are trying to run their operations,” said Breaux. “And they’re not using data that can be entered once and then copied and pasted into different spreadsheets. Every single project, fees, and units are completely different from the next.”

Once the customer signs off on the pricing estimates and project plan, the CRO manages its deliverables and schedules in the same spreadsheets. Then, when it’s time to close its accounting books for the month,

employees refer to the workbooks to figure out what work was completed during the prior month, how many units were delivered, and any other required details.

“Because CROs are doing everything in Excel, someone has to manually send that information to the accounting department to cobble together the invoices and close the books,” said Breaux.

These manual systems don’t allow CROs to do consolidated reporting across their operations, increasing data errors. They also can’t track the time that analysts, clinical programmers, and managers spend working on individual projects. To address the latter issue, CROs usually add a timekeeping system that’s completely separate from their planning and budgeting workbooks.

“How do you reconcile that? How do you make sure you’re invoicing everything and not missing anything? The answers are simple: You don’t,” said Breaux. “Overall, it’s just an extremely inefficient process that we’ve come up with a solution for.”

Sit Back While the Magic Happens

Knowing that CROs urgently need to replace their giant Excel workbooks with a comprehensive, cloud-based project management solution, Top Step uses the NetSuite SuiteProjects Pro scripting engine to help clients bring their operations onto a single platform.

A cloud-based Professional Services Automation (PSA) solution, NetSuite SuiteProjects Pro manages resources, projects, and time sheets for service organizations. It also provides dashboards, reporting, expense management, and project accounting.

When companies replace their legacy systems and disparate applications with SuiteProjects Pro, they can deliver projects more efficiently, improve resource utilization, and increase profitability.

Leveraging the power of SuiteProjects Pro and SuiteProjects Pro Scripting, Top Step developed a process for scouring Excel workbooks to pull out all relevant data and transfer it into the cloud PSA solution.

The migration process is specific to each CRO, because in Top Step's experience, every one of these firms manages its projects differently. So, the provider creates one loadable tab that's based on all of the other tabs in a specific workbook. The tab is then saved as a CSV and uploaded to SuiteProjects Pro using a customized script that receives the data and uses it to create relevant records in the PSA solution.

"It automatically creates the necessary project, customer, units/tasks, resourcing, billing, and revenue recognition rules," Breaux said. "All the CRO has to do is take a tab out of its spreadsheet, save it to a local desktop, upload it with SuiteProjects Pro Workspace, and then sit back while the magic happens."

Creating an End-to-End Experience

With an average SuiteProjects Pro implementation time of about six months, Top Step is known worldwide for being the go-to implementation partner for the cloud-based project management solution. It's been working on SuiteProjects Pro projects for more than 15 years and along the way has assembled a development team whose core focus is to build, extend, and customize SuiteProjects Pro. Top Step also manages all of the integrations between SuiteProjects Pro and NetSuite plus any outside applications that the CRO already has in place.

"We're not just implementing SuiteProjects Pro and hooking it to NetSuite; we're also implementing Salesforce on the front-end, human resources (HR) systems, customer relationship management (CRM), and other applications to create an end-to-end experience for the CRO," said Breaux. This helps CROs eliminate their manual processes, reduce their reliance on spreadsheets, and consolidate their data on a single platform.

For CROs, another major benefit of SuiteProjects Pro is its ability to be highly customized with both out-of-the-box features plus SuiteProjects Pro Scripting. Take unit-based project tracking, for example. Once this data is pulled into SuiteProjects Pro, all of the PSA's capabilities are available to the CRO, including project tracking, billing, and reporting.

"Using SuiteProjects Pro Scripting, a model can be set up to take the project definition that's being managed in the spreadsheet and import it into SuiteProjects Pro for ongoing management," said Breaux.

Once they get SuiteProjects Pro in place, most CROs are surprised by the many benefits they get simply from centralizing their data in the PSA—benefits like being able to report across multiple projects, improve resource management, and do better forecasting.

They can also easily handle change orders for, say, the customer that wants to add five new units to a project for 2023 for a total of 10, for example, and quickly return estimated costs and target deadlines without having to consult existing or create new spreadsheets.

"Change orders are fairly standard in this industry, and we developed a way for the CRO to take an existing file, upload it to SuiteProjects Pro, and identify changed terms like renegotiated prices and mid-program pricing," Breaux said. "CROs want to be able to report on what was sold, what was changed and when, and what the original and revised budgets are. That's all part of our solution."

Ready, Set, Go

Top Step helps CROs put the right people in the right place at the right time while also capturing time in the same system. With that information at its fingertips, the CRO can easily analyze how accurately its pricing units compared to the effort that will be put forth on the projects and the actual output.

“With SuiteProjects Pro, there’s no longer a need to cobble together multiple Excel spreadsheets for reports; it’s all visible to executive management down. Everyone in the organization can leverage that high level of data visibility that wasn’t previously available.”

Ronn Breaux, President and CEO, Top Step LLC

As demand for CRO services continues to grow right along with the US healthcare industry as a whole, organizations operating in this sector will need technology and automation that helps them do more with less.

“CRO businesses are becoming increasingly complex,” said Breaux, “Solving their business management problems now will be far less painful than trying to solve them a year from now, when the companies are twice their current size.”

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